**VALU**
**VA** LEARNING UNIVERSITY

# Sessions 3-5:

# VA TMS Training for Domain Managers, Learning Managers, and Item Managers

VA TMS Administrators
Role-Based Training

Virtual Instructor-Led Training

Participant Guide

April 2014

# Table of Contents

# 1.0 About This Training

### 1.1 *Training Purpose*

The purpose of the VA TMS Administrators Role-Based Training Sessions 3-5: VA TMS Training for Domain Managers, Learning Managers, and Item Managers is to provide detailed information about items, curricula, manual learning assignments and recording learning events, and how to add and work with them in the VA TMS.

### 1.2 *Target Audience*

This session is a requirement for the following target audience:

- Domain Managers
- Learning Managers
- Item Managers

### 1.3 *Training Length*

Sessions 3-5 are all 3.5 hours in length. Brief breaks will be given.

### 1.4 *Participant Guide*

This Participant Guide contains all key content presented in this training, including PowerPoint slides with room for taking notes, activities, and demonstrations for each lesson.

The Participant Guide is divided into two sections:

- About This Training
- Training Content

**NOTE: Print a hardcopy of this Participant Guide to use during training.** You will need to reference the steps for all demonstrations and activities in this guide while completing steps in the VA TMS.

### 1.4.1 Participant Guide Icons

| Icons | Description |
|---|---|
|  | This icon indicates that there will be a demonstration conducted by the instructor within the VA TMS. |
|  | This icon indicates that participants will complete an activity. |
|  | This icon indicates that there is a job aid available for the task. |

## 1.5 *Participant Preparation and Guidelines*

### 1.5.1 Requirements

Participants must complete the following for this training:

- Register for training through the VA TMS.
- Print a hardcopy of this Participant Guide for use during the training. It will be difficult to access electronically during training.

### 1.5.2 Demonstrations and System Practice Activities in VA TMS

During this training, you will observe instructor demonstrations and complete system practice activities within the VA TMS. These demos and activities will allow you to study and apply what you've learned about the features, functions, and processes critical to your role within the VA TMS. The steps for each demonstration and system practice activity have been provided in this guide so you can follow-along. You may also want to reference these steps after the training.

### 1.5.3 Virtual Instructor-Led Training Guidelines

This training will be delivered as a Virtual Instructor-Led Training (VILT) using a Web conferencing software program. You will need a computer and phone with speakers or headset in order to participate in this training. Follow the guidelines below to ensure the best training experience:

- Print a hardcopy of the Participant Guide for use during training.
- Be sure to log in to the Web conferencing software and dial in to the conference line 5 – 10 minutes early.

- Mute your phone line for the duration of the training session unless otherwise instructed.

- Use the chat feature for any questions during the session.

- The instructor may be able to answer your question immediately. Otherwise, he or she will answer at the end of the training, or send an e-mail afterward.

## 1.6 *VA TMS Administrators Role-Based Training Sessions and Target Audiences*

The table below includes a list of all training sessions in this training series, along with the target audience.

| Session | Required for | Recommended for |
| --- | --- | --- |
| **Session 1: Introduction to VA TMS for All Administrators and Help Desk and Reports Managers** | • Help Desk (as stand-alone training<br>• Reports Managers (as stand-alone training)<br>• Assignment Managers<br>• Scheduling Managers<br>• Registration Managers<br>• Domain Managers<br>• Learning Managers<br>• Item Managers<br>• AP Managers | n/a |
| **Session 2: VA TMS Training for Scheduling Managers, Assignment Managers, and Registration Managers** | • Assignment Managers<br>• Scheduling Managers<br>• Registration Managers | • Domain Managers<br>• Learning Managers<br>• Item Managers<br>• AP Managers |
| **Sessions 3–5: VA TMS Training for Domain Managers, Learning Managers, and Item Managers** | • Domain Managers<br>• Learning Managers<br>• Item Managers | n/a |

**NOTE:** Sessions 6-10 are advanced topics that are optional for managers who already have experience using the VA TMS.
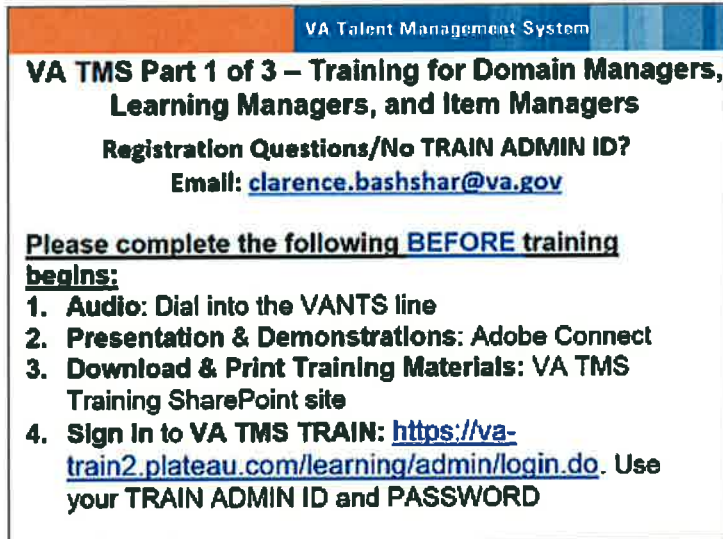
## 1.7 VA TMS Functions and Associated Roles

NOTE: Gray columns indicate add-on roles; white columns indicate stand-alone roles.

| VA TMS Admin Function | LM | DM | IM | RM | SM | AM | APM | HD | PR | OEM | CM | CIM | HR | RPT | AHM | PM | COM | ACM | ACM | MSE | MSEHD |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Unlock User Accounts | X | | | | | | | X | X | | | | | | | | | | | | |
| Reset User Passwords | X | | | | | | | X | X | | | | | | | | | | | | |
| Change Supervisors for a group of Users | X | | | | | | | | | | | | | | | | | | | | |
| Proxy into Users accounts | X | | | | | | | X | | | | | | | | | | | | | |
| Add/Remove Items to/from Learning Plan | X | | | | | X | | | | | | | | | | | | | | | |
| Add/Remove Curricula Assignments | X | | | | | X | | | | | | | | | | | | | | | |
| Record Item/External Event/Scheduled Offerings | X | | | X | | | | | | | | | | | | | | | | | |
| Edit/Delete Recorded Learning Events | X | | | X | | | | | | | | | | | | | | | | | |
| Merge User Records | | X | | | | | | | | | | | | | | | | | | | |
| Add/Edit Items | X | | X | | | | | | | | | | | | | | | | | | |
| Add/Edit Curricula | X | | X | | | | | | | | | | | | | | | | | | |
| Send Notifications | X | | | | | | | | | | | | | | | | | | | | |
| Add/Edit Scheduled Offerings | X | | | | X | | | | | | | | | | | | | | | | |
| Register Users into a Scheduled Offerings | X | | | X | X | | | | | | | | | | | | | | | | |
| Edit User's Registration in Scheduled Offering | X | | | X | X | | | | | | | | | | X | | | | | | |
| Assign/Remove Competency Profiles to/from Users | | | | | | | | | | | X | | | | | | | | | | |
| Assign/Remove Competencies to/from Users | | | | | | | | | | | X | | | | | | | | | | |
| Manage Administrator Accounts | | X | | | | | | | | | | | | | | | | | | | |
| Add/Edit/Copy/Delete Assignment Profiles | | | | | | | X | | | | | | | | | | | X | | | |
| Edit User Preferred Accreditations | | | | | | | | X | | | | | | | | | | X | | | |
| Edit User Occupational Categories | | | | | | | | X | | | | | | | | | | X | | | |
| Add/Edit/Delete Competencies | | | | | | | | | | | X | X | | | | | | | | | |
| Add/Remove Competencies from Items | | | | | | | | | | | X | | | | | | | | | | |
| Add/Edit/Delete Competency Profiles | | | | | | | | | | | X | | | | | | | | | | |
| Enter/Delete Competency Assessments for Users | X | | | X | X | X | | X | | | | | | | | | | | | | |
| Add/Edit/Delete Questions | | | | | | | | | | X | | | | | | | | | | | |
| Add/Edit/Delete Exam Objects | | | | | | | | | | X | | | | | | | | | | | |
| Assign/Remove Questions to/from Exam Objects | | | | | | | | | | X | | | | | | | | | | | |
| Add Questionnaire/Surveys | | | | | | | | | | X | | | | | | | | | | | |
| Unassign a Survey from Users | X | | | | | | | | | | | | | | | | | | | | |
| Edit Organization Dashboard Ownership | X | X | | | | | | | | | | | | | | | | X | X | | |
| Add/Edit Accreditations | | | | | | | | | | | | | | | | | | X | X | | |
| Apply Accreditations to Items | | | | | | | | | | | | | | | | | | X | X | | |
| View sensitive information on Users Records | | | | | | | | | | | | | X | | | | X | | | | |
| Create and Manage Communities | | | | | | | | | | | | | | | | | X | | | | |
| Run various Standard and Custom Reports | X | | X | X | X | X | | X | | | X | X | X | X | | | | | | X | X |
| View Self Enrolled User | X | | | | | | | | | | | | X | X | | | | | | X | X |
| Validate Self Enrolled User | X | | | | | | | | | | | | | | | | | | | X | X |
| Bookmark Available Entries | X | | X | X | X | X | | X | | | X | X | | | | X | X | X | X | X | X |
| Download Search Results | X | | X | X | X | X | X | X | X | X | X | X | X | X | | X | X | X | X | X | X |

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TMS Talent Management System

# 2.0 Training Content: Session 3 (Part 1 of 3)

## 2.1 *Welcome*

Notes:

**VA Talent Management System**

**VA TMS Part 1 of 3 – Training for Domain Managers, Learning Managers, and Item Managers**

**Registration Questions/No TRAIN ADMIN ID?**
**Email:** clarence.bashshar@va.gov

**Please complete the following BEFORE training begins:**
1. **Audio:** Dial into the VANTS line
2. **Presentation & Demonstrations:** Adobe Connect
3. **Download & Print Training Materials:** VA TMS Training SharePoint site
4. **Sign In to VA TMS TRAIN:** https://va-train2.plateau.com/learning/admin/login.do. Use your TRAIN ADMIN ID and PASSWORD

Slide 1: Session Preparation

Notes:

**VA Talent Management System**

**VA TMS Administrators Role-Based Training:**
**Part 1 of 3 – Training for Domain Managers, Learning Managers, and Item Managers**

**TMS**

**ADVANCE**
*TRANSFORMING POTENTIAL INTO PERFORMANCE*

**VALU**

Slide 2: VA TMS Administrators Role-Based Training:
(Part 1 of 3)

Talent
Management
System

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Notes:



**Session Agenda**

- Welcome and Introductions
- Lesson 1: Adding an Item
- Lesson 2: Main Areas of an Item Record
- Lesson 3: Substitutes and Prerequisites
- Lesson 4: Item Revision Assistant
- Lesson 5: Self-Assign Items
- Question and Answer

Slide 3: Session Agenda

Notes:



**Session Objectives**

After completing this session, you will be able to:

- Use item and curricula terminology correctly
- Create, configure, and modify learning items
- Assign substitutes and prerequisites to items

Slide 4: Session Objectives

Notes:

**Learning Needs Management 1 of 3**  |  **VA Talent Management System**

## Introductions

- Name
- Division of VA
- Experience with VA TMS
- Personal training goal

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Slide 5: Introductions

## 2.2 *Lesson 1: Adding an Item*



Slide 6: Lesson 1: Adding an Item
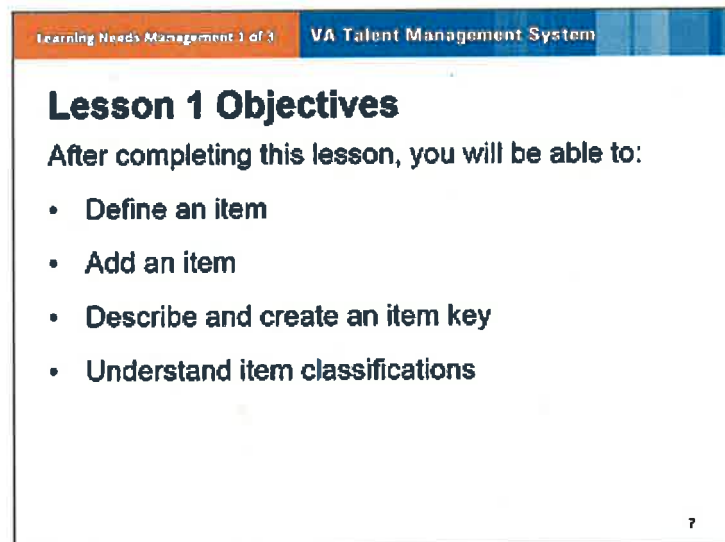


Slide 7: Lesson 1 Objectives

| Learning Needs Management 1 of 3 | VA Talent Management System |
|---|---|

## Item

An item is the smallest assignable unit that can be tracked in the VA TMS. It may be a learning or non-learning activity.

Item Examples:

- Reading a standard operating procedure (SOP)
- Obtaining a commercial driver's license
- Obtaining an annual physical
- Attending a mandatory all-hands meeting
- Attending an instructor-led workshop

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Notes:

Slide 8: Item

| Learning Needs Management 1 of 3 | VA Talent Management System |
|---|---|

## Adding an Item

- When creating a new item, use the Add New Learning Item wizard to enter key data
- When you complete the creation process and submit the data, the entered information displays in the item record

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Notes:

Slide 9: Adding an Item

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Slide 10: Add New Item Page Enhancements

Notes:



Slide 11: Item Key

Notes:

Slide 12: Item Key Parts

Notes:



Slide 13: Item Classifications

Notes:

Notes:

Slide 14: Adding Catalog and Subject Area Information



Notes:

Slide 15: Demonstration: Creating an Item

**Demonstration: Creating an Item**

1. Navigate to **Learning > Items**.
2. Select **Add New**. **NOTE:** You can also enter **Add Item** into the Search field below the button bar and select **Go**.
3. Select to select the item type, **Scheduled Only**. The plus sign changes to a checkmark.
4. Select **OK**.
5. Select an item type from the drop-down menu.
6. Enter the item title.
7. Enter a description for the item.
8. Select a domain for the item.
9. Uncheck the **Approval required to self-register** checkbox (if it is currently checked).
10. If there is an entry in the Approval Process field, remove it. (If there is a drop-down menu, scroll to the very top of the list and select the blank entry.)
11. Enter the number of hours into learning hours and credit hours. (You may need to scroll down using the inner window's scrollbar on the right.)
12. In the Schedule Template section, on the right side, select **"2"** from the Number of days drop-down menu.
13. Enter **8** in the Hours per day field (if not already defaulted).
14. Select **Save & Exit**.

Slide 16: System Login

Notes:



Slide 17: Activity #1: Create an Item

Notes:

### Activity #1: Create an Item

**Scenario:** Your area is going to offer two new courses for new hires and you have been asked to create the two new items in the VA TMS. The two items are New Hire Orientation and IT Policies. Use the information below for both items.

1. Place the items in **TRAIN** domain.
2. The courses are Instructor Led, 4 hrs. in length, and 4 credit hours.
3. Use your initials in **Item ID**, **Title**, and **Description**.
4. Place the items in the **TRAIN domain**.
5. Place the New Hire item in the **HR and Staff Development** subject area.
6. Place the IT Policies item in the **Information Technology** subject area.
7. Assignment type ID: **Required**.

## 2.3 *Lesson 2: Main Areas of Item Record*



Notes:

Slide 18: Lesson 2: Main Areas of Item Record



Notes:

Slide 19: Lesson 2 Objectives
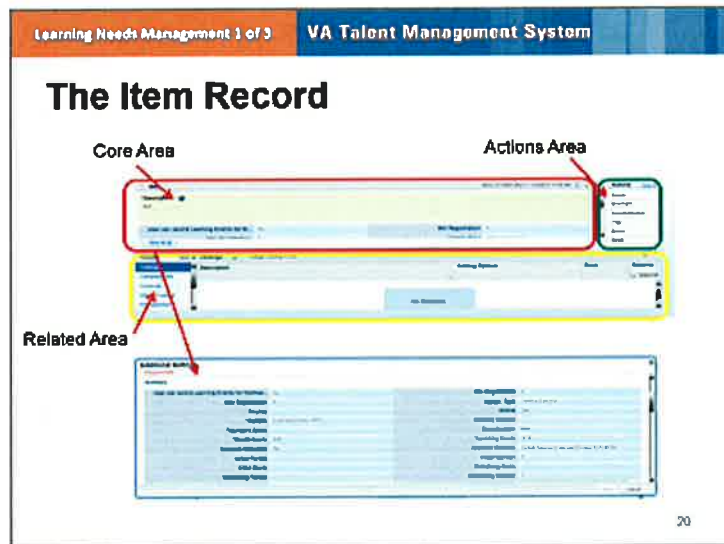
Slide 20: The Item Record



Slide 21: Demonstration: Three Main Areas of the Item
Record

**Demonstration: Three Main Areas of the Item Record**

1. Navigate to **Learning > Items.**

2. Select **Search from the TRAIN domain**

3. Select an item from your search results. Once the item record is displayed, review the main areas of the record.

**Core Area:**

The core area contains the basic information of the item record, including the item title, item key, description, and classification. To edit any field in this area, select in a displayed field and enter text or select a reference value (depending on the field type). Once expanded, the screen displays the following sections where updates can be made:

- Title
- Description
- Summary
- Extended Summary
- Design
- Process Control

**Related Area:**

The Related area of the item record contains additional information regarding the item. Select tabs on the **Related** tab on the left such as  Segments to display the details on the right. Select **More** to see additional Related tabs.

**Actions Area:**

The Actions area of the item record contains links to additional actions that can be taken on the item record, including:

- Assign (initiates the User Needs Management tool to enable you to batch assign items and curricula to one or more users)
- Schedule (create a scheduled offering of the item)
- Send Notification (initiates the ad hoc notification wizard)
- Copy (opens the Copy Item window that allows you to copy the item)
- Revise (initiates the revision wizard)

- Delete (deletes the item)
- Bookmark
- Cancel the Scheduled Offering
- View Roster

Notes:

Slide 22: Activity #2: Adding Information to an Item's Core Area

### Activity #2: Adding Information to an Item's Core Area

1. Using the item created in Activity #1, select the **Assign Type** field and select **Required (REQ)** from the drop-down menu.

2. Select **Save.**

**In the Summary section:**

1. Select the **Source** field and select **Internal (INT)** from the menu.

2. Select the **Enable User Requests** field and select **Yes** (if not already selected by default).

3. Select the **Maximum Registration** field and enter a default number of maximum users that should be enrolled when the item gets scheduled.

4. Select the **Minimum Registration** field and enter a default number of minimum users that should be enrolled when the item gets scheduled.

5. Select the **Self-Registration** field and select **Yes** from the drop-down menu (if not already selected by default).

6. Select **Save**?

**NOTE:** This will give users who are assigned this item 30 days to complete it from the assignment date.

**In the Process Control section:**

1. Select the **Supervisors can record Learning Event** field and select **No** (if not already selected by default).

2. Select the **Users can record Learning Event** field and select **No** (if not already selected by default).

3. Select **Save.**

Check in with participants to find out if they have questions about this activity and if they would like to see anything re-demo'd.

Notes:

**Working with Segments**

- A segment is a block of time within a scheduled offering

- The Segments tab of the item contains the default segments added when the item was created

*Learning Needs Management 1 of 3* — VA Talent Management System — 23

Slide 23: Working with Segments

Notes:

**Knowledge Check**

List the three parts of the item key:

a.
b.
c.

*Learning Needs Management 1 of 3* — VA Talent Management System — 24

Slide 24: Knowledge Check

Notes:

**Knowledge Check**

Learning Needs Management 1 of 3 | VA Talent Management System

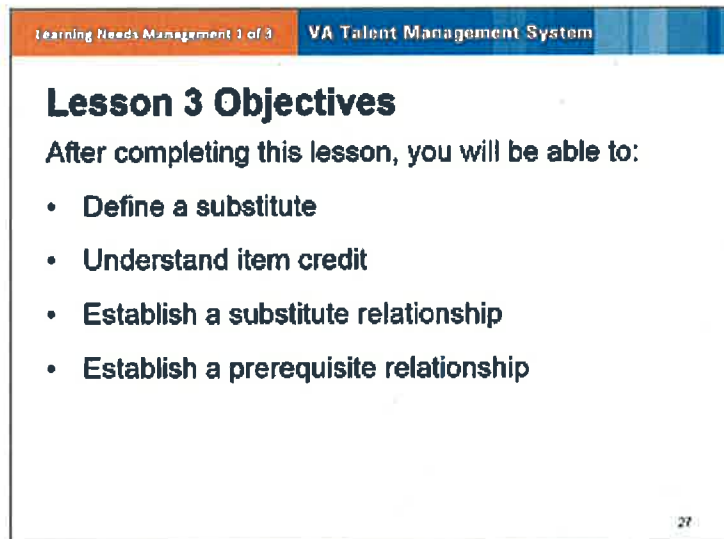List and describe the four types of item classification:

a.
b.
c.
d.

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Slide 25: Knowledge Check

## 2.4 *Lesson 3: Substitutes and Prerequisites*



Slide 26: Lesson 3: Substitutes and Prerequisites

Notes:



Slide 27: Lesson 3 Objectives

Notes:

**Notes:**

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**Learning Needs Management 1 of 5** | **VA Talent Management System**

## Substitute

- Ability to grant a user substitute credit for an event by completing another event
- Configure the item which RECEIVES substitute credit with the substituting item
- Use the Force Credit option to give substitute credit for items that are not assigned to users
- Retroactive substitute credit can be granted by using an effective date
- Only one level of substitution occurs

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Slide 28: Substitute

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**Notes:**

**Learning Needs Management 1 of 5** | **VA Talent Management System**

## Credit for Items

Upon successful completion of a substitute item, the VA TMS grants credit for another item by recording two learning events.

Item given credit for

| Item Title | Status | Completion Date | Details |
|---|---|---|---|
| COURSE IT-107 (Rev 2003 - 10/30/2004 07:49 PM America/New York) | Collateral Credit | 6/8/2009 03:52 PM America/New York | View Details |
| Microsoft Word 2003: Foundations | | | |
| COURSE IT-108 (Rev 2003 - 10/30/2004 07:49 PM America/New York) | Attended Event or Activity | 6/8/2009 03:52 PM America/New York | View Details |
| Microsoft Word 2003: Advanced Concepts | | | |

Item attended

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Slide 29: Credit for Items
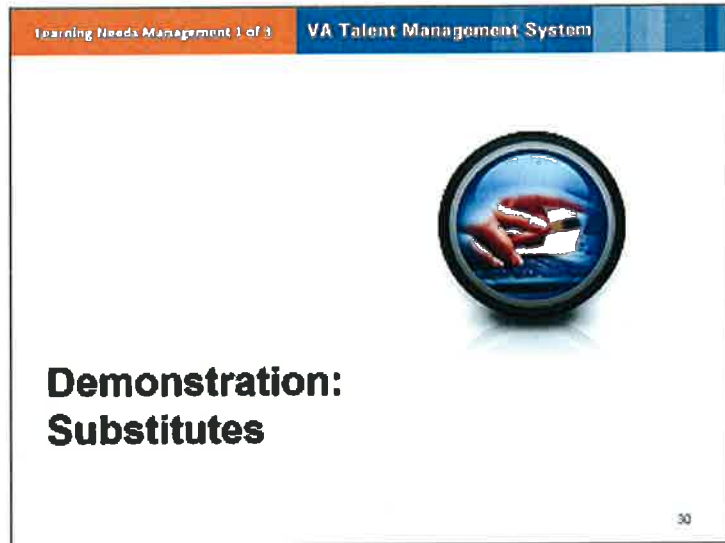
Notes:

Slide 30: Demonstration: Substitutes

**Demonstration: Substitutes**

1. Navigate to **Learning > Items.**

2. Select **Search.**

3. Select the item that will be recorded into a user's learning history (completed work) with a status of substitute credit.

4. Select the **item ID** link.

5. Select the **Substitutes** tab from the Related area.

6. Select **Add New Substitutes**. (green circle with white plus sign icon)

7. Enter criteria to search for the item that will grant substitute credit.

8. Select **Search**.

9. Select the **(completion) status substitute credit** from the Status drop-down menu. **NOTE:** This is the completion status for the item that will receive substitute credit.

10. Check the **Force Credit** checkbox. **NOTE:** If Force Credit is not checked, then users must have the item receiving substitute credit on their To-Do List in order to record the substitute learning event. When Force Credit is checked, users always receive substitute credit for the item regardless of whether it is assigned to their To-Do List.

    **NOTE:** If you would like to apply retroactive substitute credit, enter an effective date.

11. Check the **Add** checkbox.

12. Select **Add**.

13. Verify the selected item is displayed with the correct settings.

14. Record a learning event for the item that grants substitute credit.

15. Check the user's Completed Work (Learning History).

The Job aid: Manage Substitutes and Prerequisites is available in the VA TMS.

Slide 31: Activity #3: Substitute

Notes:

### Activity #3: Substitutes

**Scenario:** The VA has recently added two courses, Motorcycle Safety and Motorcycle Safety Advanced, for their Security officers. If an officer qualifies for the Motorcycle Safety Advanced Course, he or she should get credit for the basic Motorcycle Safety Course.

Create a substitute relationship for Motorcycle Safety, so if an officer takes the Advanced course, he or she will get credit for the basic course.

1. Navigate to **Learning > Items**.
2. Search for the **Motorcycle Safety Course** (Item Title, contains, motorcycle safety).
3. Select **Copy** from the Actions menu. Select **Add the new item to the catalog** and select **Copy**.
4. Add your initials to the title of the item and select **Save**.
5. Select the **Substitutes** option from the Related area.
6. Select the **Add New Substitutes** button.
7. Enter search criteria to search for Motorcycle Safety Advanced.
8. Select **Search**.
9. Select the appropriate status from the status drop down menu (Complete).
10. Check the **force credit checkbox** (to give credit for the item even if it is not on the user's To-Do List).
11. Add effective date if retroactive credit is required.
12. Select the **Add** check box.
13. Select **Add**.
14. Verify the selected items displays with correct settings in the Related area of the Item record.

Notes:

**Learning Needs Management 1 of 3** — **VA Talent Management System**

## Prerequisites

- Prerequisites are identified on the item record's Prerequisite tab in the Related area.
- Depending on settings, users who do not meet the prerequisites are prevented from registering into the scheduled offering if:
  - The prerequisite(s) is(are) not listed in the user's Learning History
  - The user is not registered into scheduled offering(s) of the prerequisite(s) that has(have) an end date prior to the start date of the scheduled offering

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Slide 32: Prerequisites

Notes:

**Learning Needs Management 1 of 3** — **VA Talent Management System**

## Demonstration: Prerequisites

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Slide 33: Demonstration: Prerequisites

**Demonstration: Prerequisites**

1.  Navigate to **Learning > Items.**
2.  Select **Add New.**
3.  Add two new items.
2.  Select the **Prerequisites** tab from the Related area of one of the items.
3.  Select **Add New Prerequisites**.
4.  Enter criteria to search for the other item created in step 1. This will be the prerequisite item.
5.  Select **Search**.
6.  Check the **Add** checkbox.
7.  Select **Add**.
8.  Verify the selected item is displayed.

The Job Aid: Manage Substitutes and Prerequisites is available in the VA TMS.

Slide 34: Activity #4: Establish a Prequisite
Relationship

Notes:

### Activity #4: Establish a Prerequisite Relationship

**Scenario:** You have decided to make the basic Motorcycle Safety Course a prerequisite for the Advanced Motorcycle Safety Course.

To create the Prerequisite relationship in the VA TMS:

1. Navigate to **Learning > Items.**
2. Search for and select **Advanced Motorcycle Safety Course** or select from Recents.
3. Select **Copy** from the Actions area of the item record.
4. Add your initials to the title of the copied item and select Save.
5. Go to **Prerequisites** in the Related area of the item record. Select on the **Add** icon. Search for your copy of Motorcycle Safety Course.
6. Check the **Add** box.
7. Verify that the course has been added as a prerequisite.

Notes:

**Knowledge Check**

Explain a situation where you need to create a substitute relationship.

Slide 35: Knowledge Check

Notes:

**Knowledge Check**

Why would you check the Force Credit checkbox on the Substitute tab of the item record?

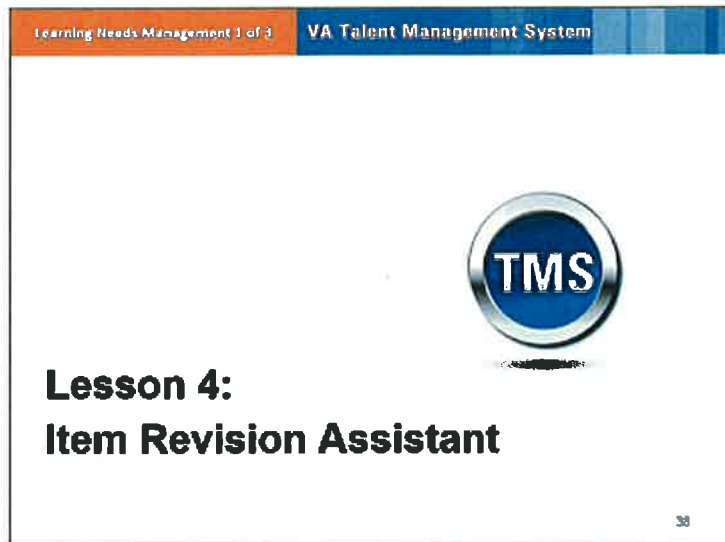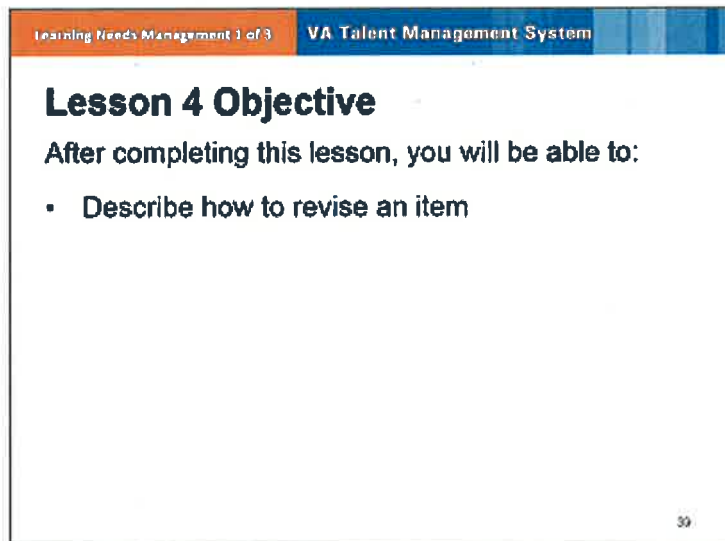Slide 36: Knowledge Check

Notes:

Slide 37: Knowledge Check

## 2.5 *Lesson 4: Item Revision Assistant*



Notes:

Slide 38: Lesson 4: Item Revision Assistant



Notes:

Slide 39: Lesson 4 Objective

## Item Revision

When significant changes have been made to an item, the Item Revision Assistant enables the admin to create a new version of items for users who:

- Are required to complete the item as a part of a curriculum

- Have the item as a free-floating assignment

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Notes:

Slide 40: Item Revision

## Revising Items

Creating a new revision of an item can have many effects:

- Creates a new item key identical to the old one, with an updated revision date and time
- Old item remains for audit and reporting and should be deactivated
- Affects substitutes, instructors, and curriculum assignment of the item
- Free-floating assignment
- Future offerings
- Prerequisites

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Notes:

Slide 41: Revising Items

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Notes:

Slide 42: Demonstration: Revise an Item

**Demonstration: Revise an Item**

1. Navigate to **Learning > Items**.
2. Search for an item and select the **item ID**.
3. Select **Revise** in the Actions area.
4. Enter a new revision date, revision time, and revision number.
5. Change the item title, if necessary.
6. Select **Next**.
7. Check the substitute relationship and authorized instructors checkboxes.
8. Select **Next**, then **Next** again
9. Select the **Make this item production ready** option.
10. Select **Next**.
11. Check all four checkboxes in Step 4 of the item revision process.

**NOTE:** If this item is part of a curriculum, review the item settings within each curriculum and make any necessary changes to assignment types, initial periods, retraining periods, etc. If the item has an assignment type of Required (or similar), you must enter an effective date.

12. Select **Next** and review the displayed information.
13. Select **Run Job Now**.

The Job Aid: Revise Items is available in the VA TMS.

Slide 43: Activity #5: Revise an Item

Notes:

### Activity #5: Revise an Item

1. Navigate to **Learning > Items**.

2. Search for an item and select the **item ID**.

3. Select **Revise** in the Actions area.

4. Enter a new revision date, revision time, and revision number.

5. Change the item title, if necessary.

6. Select **Next**.

7. Check the **substitute relationship** and **authorized instructors** checkboxes.

8. Select **Next**.

9. Select the **Make this item production ready** radio button.

10. Select **Next**.

11. Check all four checkboxes in Step 4 of the item revision process.

12. Select **Next**.

   **NOTE:** If this item is part of a curriculum, review the item settings within each curriculum and make any necessary changes to assignment types, initial periods, retraining periods, etc. If the item has an assignment type of Required (or similar), you must enter an effective date.

13. Select **Run Job Now**.

The Job Aid: Revise Items is available in the VA TMS
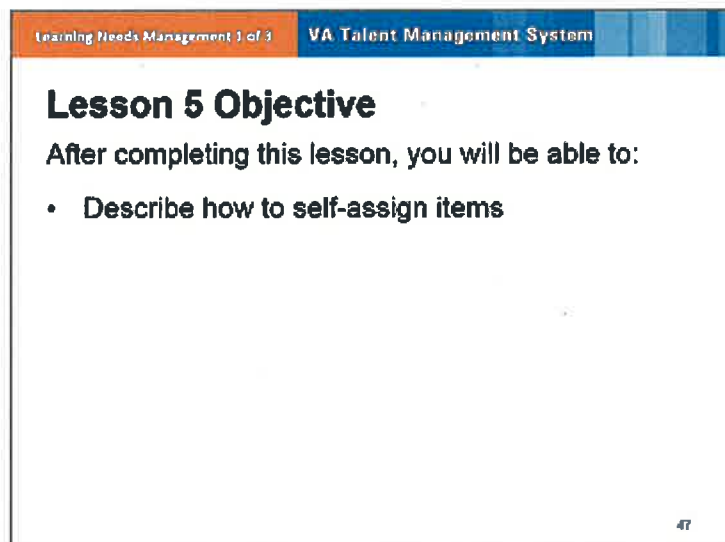
Slide 44: Knowledge Check

Notes



Slide 45: Knowledge Check

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## 2.6 *Lesson 5: Self-Assign Items*



Slide 46: Lesson 5: Self-Assign Items
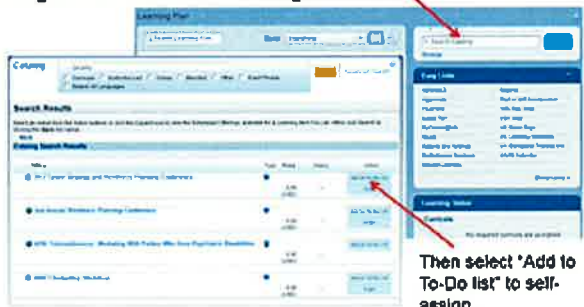
Notes:



Slide 47: Lesson 5 Objective

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Slide 48: Self-Assign Items



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Slide 49: Demonstration: Self-Assign an Item

**Demonstration: Self-Assign an Item**

1. Using the item created in Activity #1, select the **Catalogs** tab in the Related area.

2. Select the **Add New Catalogs** icon.

3. Enter the keyword, **user**, and select **Search**.

4. Select the **Add** checkbox next to any learning management system (LMS) user catalog.

   **NOTE:** The Add Schedules checkbox should be checked if you also want to add all existing scheduled offerings to this catalog.

5. Select **Add**.

6. Verify that all selected catalogs are displayed.

7. Select the **Flag** drop-down menu.

8. Select **New** from the drop-down menu.

9. Select the **Until calendar** icon.

10. Select the last date to display the flag.

11. In the **Reason** field, enter why this item is flagged (user viewable).

12. Enter an expiration date (if desired).

   **NOTE:** This date determines when the item is to be automatically removed from the catalog. It is removed by the purged expired catalog APM.

13. Select **Save**.

The Job Aid: Edit Instructor-Led Items is available in the VA TMS.

Notes:



Slide 50: Activity #6: Self-Assign an Item

**Activity #6: Self-Assign an Item**

1. Select the **Add New Catalogs** icon.

2. Enter the keyword, user, and select **Search**.

3. Select the **Add** checkbox next to any LMS user catalog. **NOTE:** The Add Schedules checkbox should be checked if you also want to add all existing scheduled offerings to this catalog.

4. Select **Add**.

5. Verify that all selected catalogs are displayed.

6. Select the **Flag** drop-down menu.

7. Select **New** from the drop-down menu.

8. Select the **Until calendar** icon.

9. Select the last date to display the flag.

10. In the **Reason** field, enter why this item is flagged (user viewable).

11. Enter an expiration date (if desired). **NOTE:** This date determines when the item is to be automatically removed from the catalog. It is removed by the purged expired catalog APM.

12. Select **Save**.

The Job Aid: Edit Instructor-Led Items is available in the VA TMS.

Slide 51: Evaluation & Self-Certification Reminder

Notes:



Slide 52: Questions?

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